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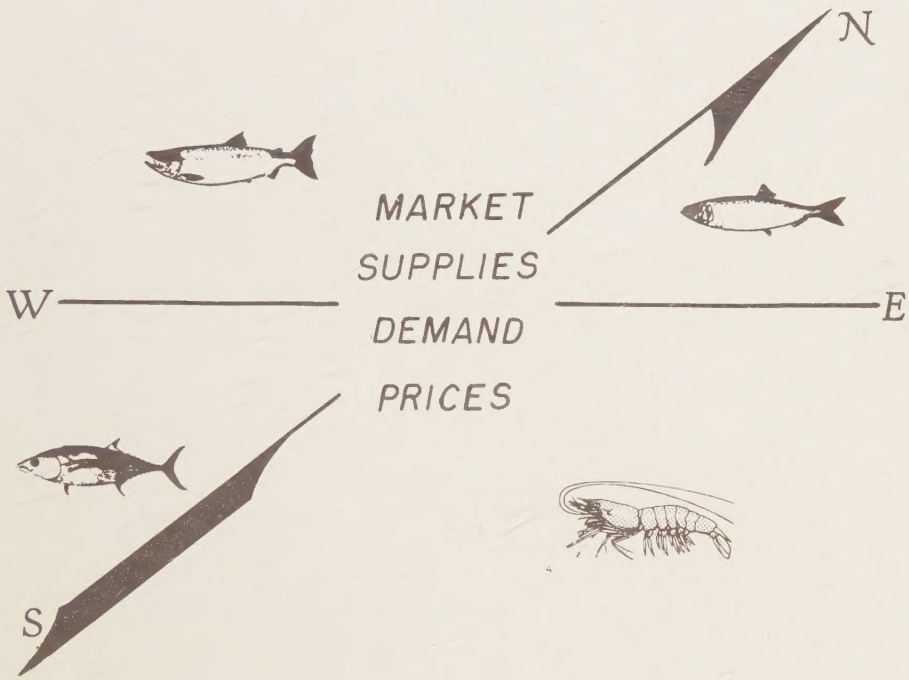
COMMERCIAL FISHERIES OUTLOOK



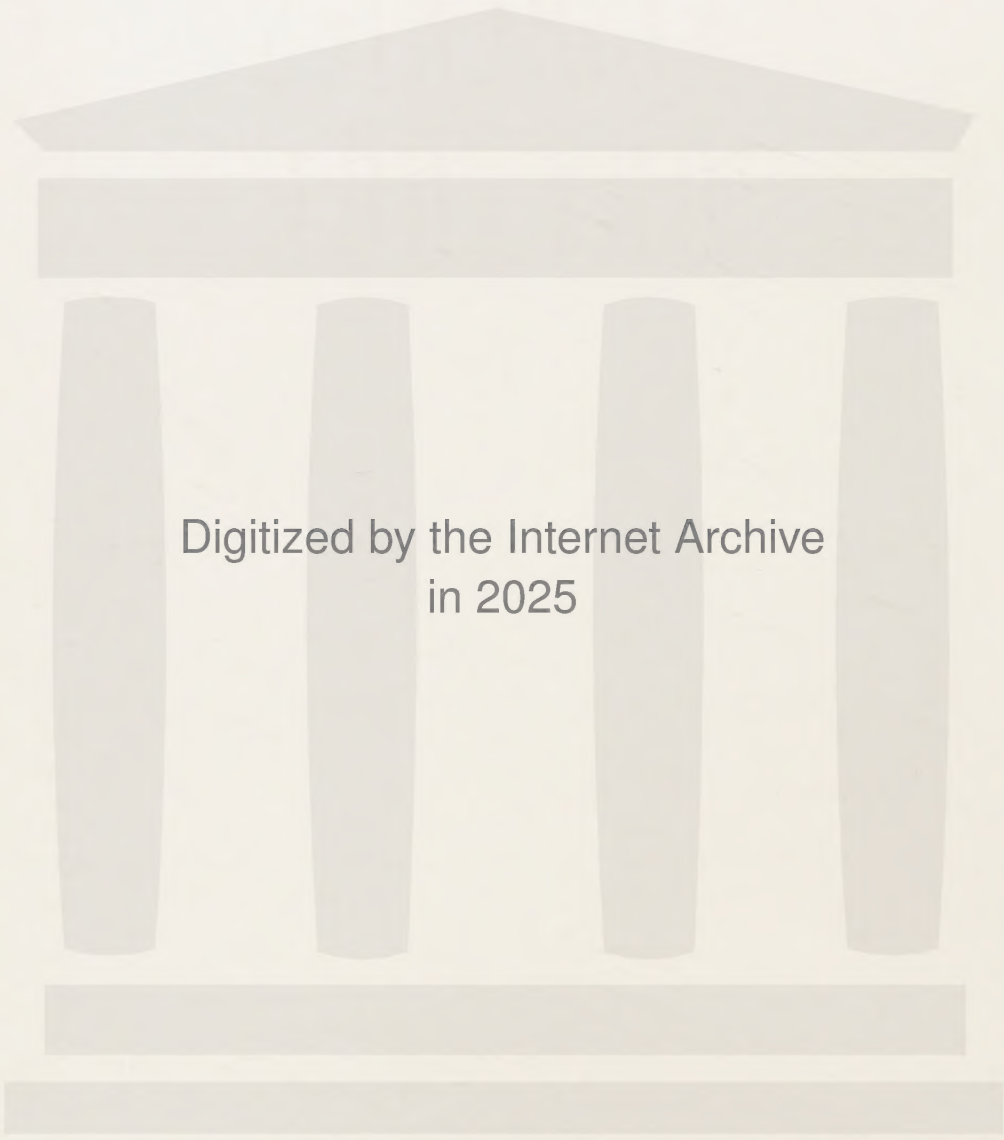
January - March 1959

U.S. FISH AND WILDLIFE SERVICE

Department of the Interior

Washington, D.C.

Fishery Leaflet 336mm



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United States Fish and Wildlife Service
Department of the Interior

Fishery Leaflet 336 mm

Washington 25, D. C. January 1959

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Prepared in the Bureau of Commercial Fisheries

COMMERCIAL FISHERIES OUTLOOK

January - March 1959

THE OUTLOOK AT A GLANCE

BUSINESS ACTIVITY.....	Continued gains as the economy shows sustained recovery from the recession; some inflationary trends.
FOOD.....	Wheat and feed grain supplies especially abundant. Increases in dairy products, pork, poultry, and eggs.
FISHERY PRODUCTION.....	Seasonally low during the first quarter.
MARKETS, EDIBLE FISH.....	Generally steady for most species.
MARKETS, INDUSTRIAL PRODUCTS	Fish oils and meal, firm.
IMPORTS	High for groundfish fillets and blocks, tuna, fresh water species, and shrimp.
EXPORTS	Continued decline for fish oils, some gains for canned sardines.

GENERAL BUSINESS CONDITIONS

The recession is over. The upswing which began at a rather rapid rate last spring had begun to slow up in the fall. However, full recovery is in sight. Unemployment is a major sour note in the economy. There are also predictions of inflation resuming its march.

INDUSTRIAL PRODUCTION - In November, industrial production rose to 141 percent of the 1947-49 average. This was two points above the 1957 figure. Advances in the automotive industry were accompanied by widespread gains throughout manufacturing. Nondurable goods production reached a new high. Gains since last spring have been most marked in the textile, apparel, leather, and rubber industries, where recession curtailments in output of nondurables had been greatest.

CONSTRUCTION - The value of new construction continued to advance and in November it was at a record rate of $52 billion, 6 percent above a year ago. Private residential and public highway construction were chiefly responsible for the November increase. Industrial construction rose for the first time in over a year.

EMPLOYMENT - Nonfarm employment increased 200,000 in November, reflecting settlement of labor disputes in durable goods manufacturing industries. At 50.8 million, the employment level was about 700,000 above the April low but still one million below a year ago. However, unemployment, which usually rises in November, remained at 3.8 million representing 6 percent of the civilian labor force.

DISTRIBUTION - Total retail sales increased 1.5 percent in November and were one percent above the previous high in the summer of 1957. A sharp rise in deliveries of new autos was an important factor in over-all expansion. Sales at department stores remained at about the September-October level and were 2 percent above a year ago.

COMMODITY PRICES - Wholesale prices of industrial commodities continued to advance from early November to early December. Meanwhile, prices of farm and food products declined somewhat further, reflecting mainly decreases in meats. The average level of wholesale commodity prices continued to change little.

THE FOOD SITUATION

FOOD OUTLOOK

The outlook is for continued heavy supplies of farm products generally. Wheat and feed grain supplies especially are expected to be in abundant supply. There are indications of slightly lower agricultural exports in '59 than last year.

MEATS

Total cattle slaughter in 1959 is not expected to be much greater than in 1958. The consumption of meat generally should be only slightly above the rate of 152 pounds per person estimated for 1958. Most of the increase will be in pork. Beef consumption is expected to remain about the same as last year.

DAIRY PRODUCTS

Milk and dairy products supplies will continue to be plentiful in 1959. A small increase in milk production is expected this year. Per capita consumption of milk and dairy products is expected to be about the same as in 1958 - about 75 pounds, in terms of total milk solids.

POULTRY AND EGGS

Increases in supplies of both poultry and eggs are in prospect for 1959. Per capita consumption of poultry meat is expected to rise to a new high. Egg consumption should hold close to the 1958 level of 348 eggs per person. Prices will reflect larger production.

FATS AND OILS

The total supply of food fats during 1959 will be about 15 percent above last year's 11.7 billion pounds. It is expected that exports of food fats may be somewhat larger than the 2.6 billion pounds shipped during 1958. Consumption of food fats and oils will be close to the 1958 rate of 45 pounds per person.

VEGETABLES

Supplies of canned vegetables into mid-1959 are likely to be slightly larger than the heavy supplies of last year. Frozen vegetables will be in shorter supply than last season, but generally considered ample. Stocks of both canned and frozen vegetables at the beginning of the season were lower than last year, but indications are that the increase in the canned pack will more than offset the smaller beginning stocks. Per capita consumption of processed vegetables is expected to continue at a high level.

GENERAL FISHERY SITUATION

COLD-STORAGE HOLDINGS on December 1 were almost 12 million pounds higher than those on December 1, 1957.

LANDINGS OF FISH AND SHELLFISH through November were about 5 percent below those for the same period of 1957. Landings of 3.7 billion pounds in the first ten months of 1958 compare with landings of 3.9 billion pounds in the similar month of 1957.

MENHADEN LANDINGS of 1.4 billion pounds through November of this year were 205 million pounds less than those at the end of November 1957.

LANDINGS OF CALIFORNIA SARDINES for the 1958 season are greater than any year since 1951. Total 1958 sardine catch was 101,000 tons.

CANNERY RECEIPTS of fresh and frozen tuna in California during 1958 were 228,300 tons, a new record. Imports represented 32 percent of this total.

OCEAN PERCH LANDINGS, in New England according to preliminary figures, were about 11 percent higher during the first eleven months of 1958 than the landings for the same period in 1957. Value was up about 24 percent.

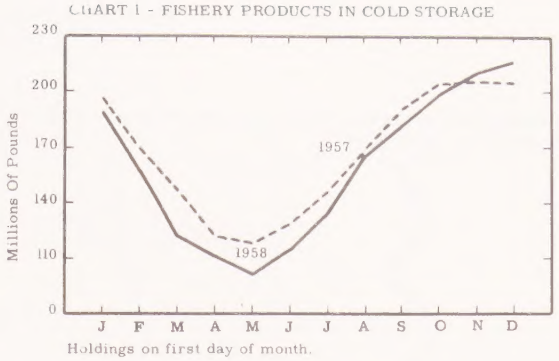
CATCHES OF SALMON in both the Pacific Coast States and the State of Alaska were up, with the total catch about 48 million pounds greater than in 1957.

Fishery Products in Cold-Storage

December 1

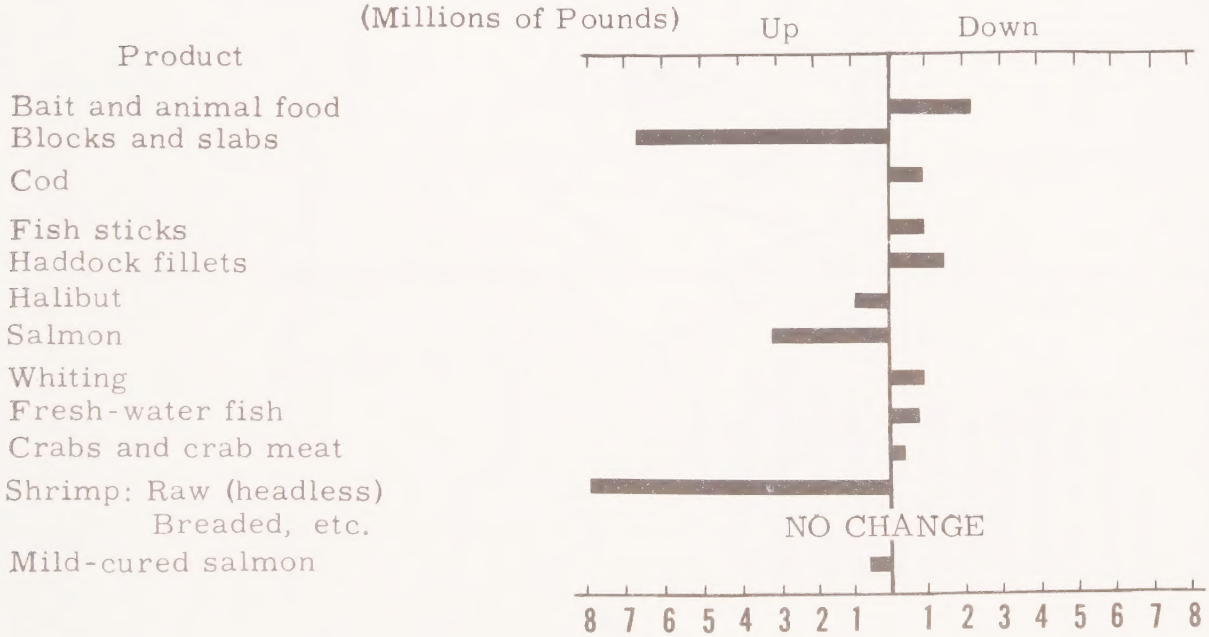
1958.....217,327,000 Lbs.

1957.....205,186,000 Lbs.



Total cold-storage holdings of fish and shellfish on December 1, 1958 were approximately 6 percent higher than those of the same date in 1957. Bait and animal food represented 4 percent of these holdings in 1958 and slightly more than 5 percent in 1957. The accompanying chart indicates the changes in holdings of certain species from December 1, 1957.

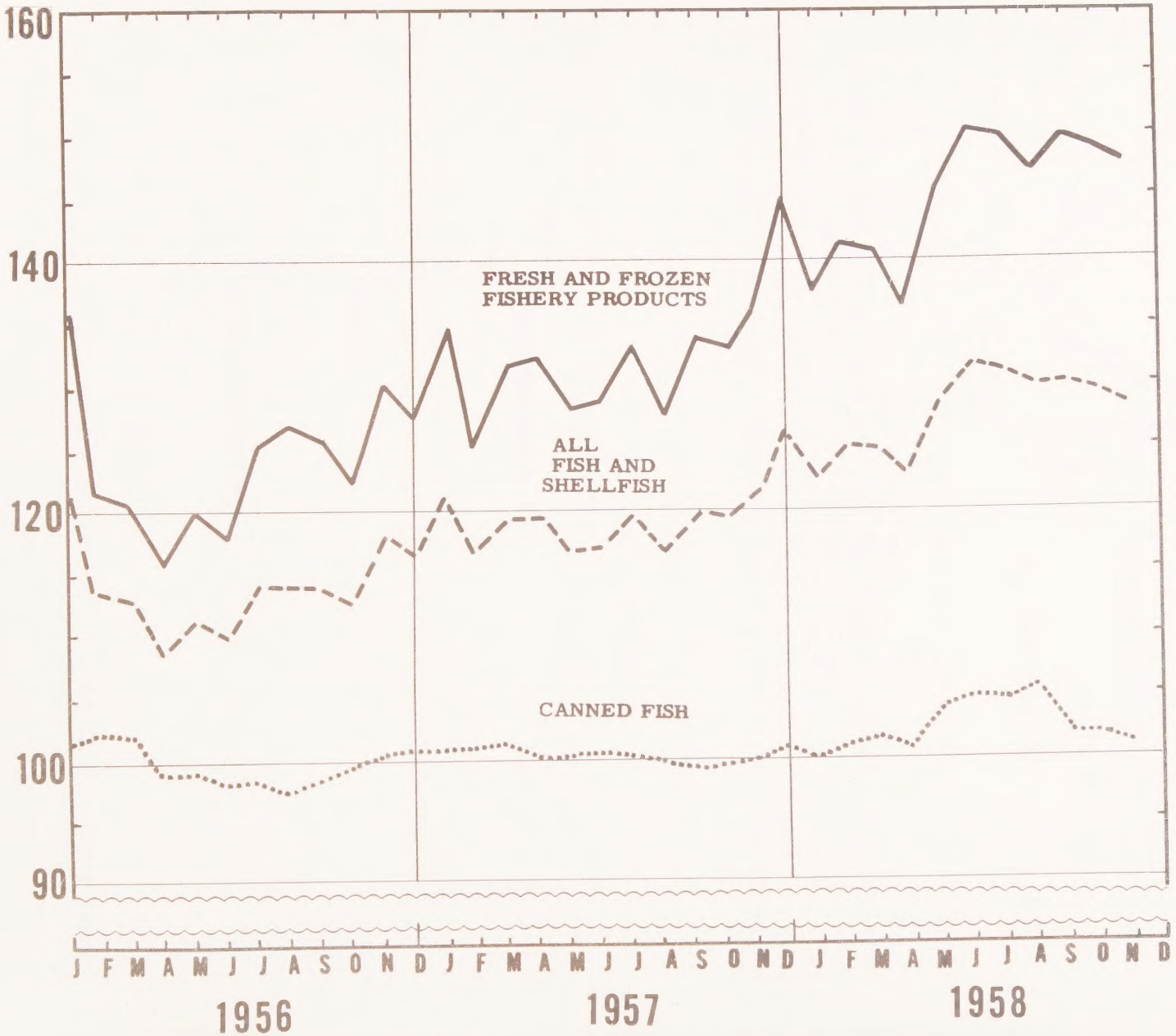
December 1, 1958 Compared With December 1, 1957



The November, 1958 wholesale price index for all fish and shellfish was up 7.4 points from that during November, 1957. Fresh and frozen fishery products had an index increase of 11.8 points, and the index for canned fish was up only 1.1 points (Chart 2).

CHART 2 - INDEXES OF WHOLESALE FISH PRICES

1947 - 1949 = 100


160
140
120
100
90
FRESH AND FROZEN FISHERY PRODUCTS
ALL FISH AND SHELLFISH
CANNED FISH
J F M A M J J A S O N D J F M A M J J A S O N D J F M A M J J A S O N D
1956
1957
1958

SPECIFIC MARKETING SITUATIONS

Salt-water Fish

ANCHOVIES, CANNED

Market - Firm Supplies - Light Demand - Good

Domestic Pack, January - October

1958..... 53,816 Std. Cases (48 Halves)

1957.....546,005 Std. Cases (48 Halves)

Pack of canned anchovies continues extremely light, and during the first ten months of 1958 it was 90 percent below that during the same period in 1957.

Landings - Only 3,500 tons of anchovies were taken through October of 1958, in contrast to 21,250 tons for the comparable 1957 period.

Prices - should remain firm.

FISH STICKS

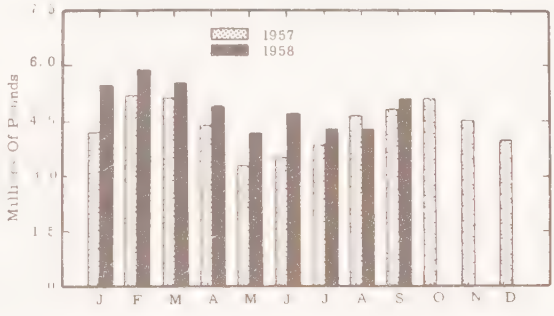
Market - Steady Supplies - Moderate Demand - Good

Production, January - September

1958.....44,464,000 Lbs.

1957.....38,855,000 Lbs.

CHART 3 - FISH STICK PRODUCTION



Production of fish sticks through September of 1958 was higher, by 5.6 million pounds, than that during the same period in 1957 (Chart 3). With continued improvements in quality, fish stick sales will increase, especially during the approaching Lenten season. During the first nine months of 1958, cooked fish sticks were up 15 percent compared with the quantity reported for the same period of 1957. Uncooked fish sticks were 9 percent above last year.

Cold-Storage Holdings

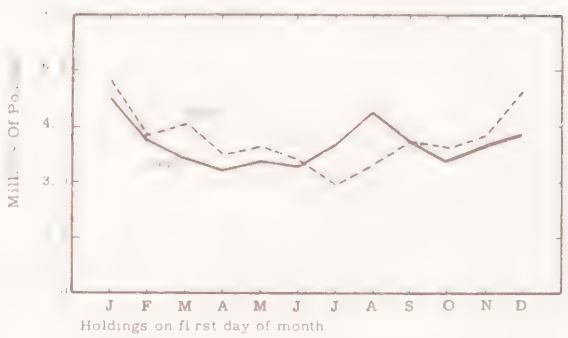
Fish Sticks

December 1

1958..... 4, 307, 000 Lbs.

1957..... 5, 361, 000 Lbs.

CHART 4 - FISH STICKS IN COLD STORAGE



Cold-Storage Holdings

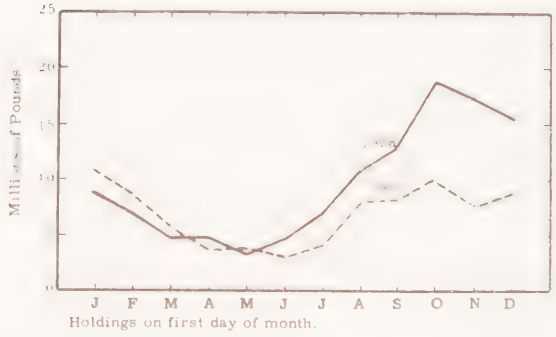
Blocks and Slabs

December 1

1958..... 15, 350, 000 Lbs.

1957..... 8, 615, 000 Lbs.

CHART 5 - BLOCKS AND SLABS IN COLD STORAGE



Cold-storage holdings of fish sticks on December 1, 1958 were almost 20 percent below those on December 1, 1957 (Chart 4). Blocks and slabs in cold-storage, however, were 79 percent greater than the 1957 holdings on the same date (Chart 5).

Prices are expected to remain firm.

FLOUNDER AND SOLE

Market - Steady Supplies - Moderate Demand - Good

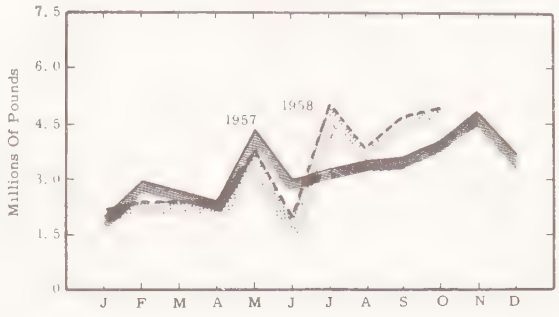
Massachusetts Landings

January - October

1958.....33,539,000 Lbs.

1957.....31,330,000 Lbs.

CHART 6 - LANDINGS OF FLOUNDER AND SOLE, MASSACHUSETTS



Landings of flounder and sole through ten months of 1958 were 7 percent higher than those through October of 1957 (Chart 6). Demand should continue good during the first quarter with production at the seasonal low. The market will remain steady.

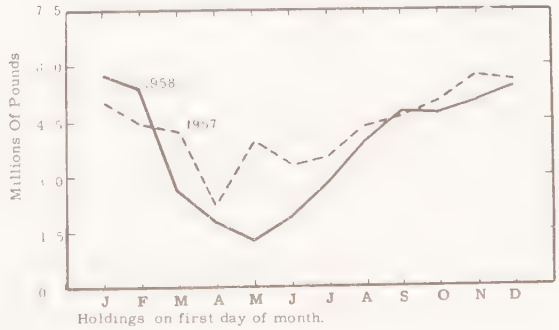
Cold-Storage Holdings

December 1

1958.....5,445,000 Lbs.

1957.....5,621,000 Lbs.

CHART 7 - FLOUNDER AND SOLE FILLETS IN COLD STORAGE



Holdings on first day of month.

On December 1, the cold-storage holdings of flounder and sole were about 3 percent below those on the same date in 1957 (Chart 7). Stocks will probably decline during this quarter.

FLOUNDER AND SOLE (Cont.)

Imports, January - September

(Fillets)

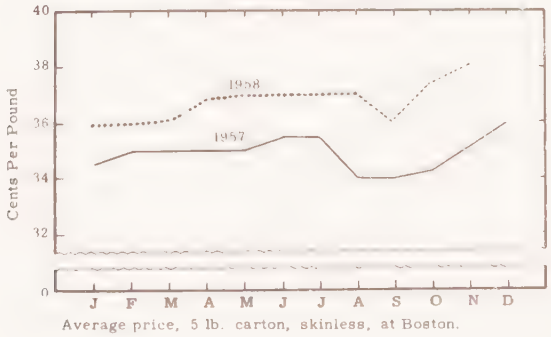
1958..... 11,318,000 Lbs.

1957..... 10,402,000 Lbs.

Imports of flounder and sole during the first nine months of 1957 were approximately 9 percent higher than those during the same period of 1957. Canada supplied 97 percent of this total.

Prices, which dropped in September, rose to a high level in November and are expected to remain high during the first quarter (Chart 8).

CHART 8 - WHOLESALE PRICES OF YELLOWTAIL FLOUNDER FILLETS



Average price, 5 lb. carton, skinless, at Boston.

GROUNDFISH FILLETS, INCLUDING OCEAN PERCH

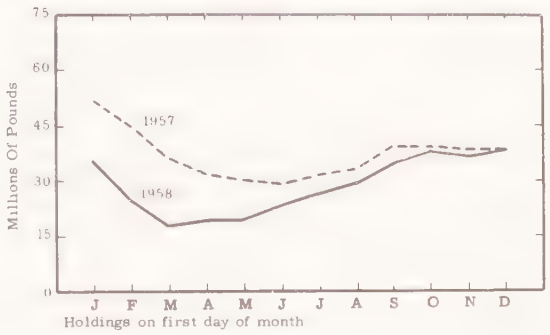
Cold-Storage Holdings

December 1

1958..... 37,962,000 Lbs.

1957..... 38,611,000 Lbs.

CHART 9 - GROUNDFISH FILLETS IN COLD STORAGE
(EXCLUDING BLOCKS)



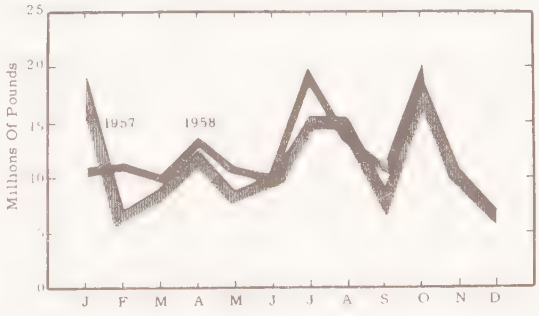
Cold-storage holdings of groundfish fillets, excluding blocks and slabs, on December 1, were only slightly below those on the same date in 1957 (Chart 9). Tables and charts on the succeeding pages show changes in groundfish fillet holdings by species.

Imports, January - November

1958..... 138,295,000 Lbs.

1957..... 135,282,000 Lbs.

CHART 10 - IMPORTS OF GROUNDFISH FILLETS
(INCLUDING BLOCKS)



Imports of groundfish fillets, including blocks, through November, 1958 were slightly more than 2 percent higher than those during the eleven month period in 1957. Canada supplied 72 percent of the total, followed by Iceland with 13 percent, and Denmark with 7 percent (Chart 10).

COD FILLETS

Market - Steady Supplies - Light Demand - Good

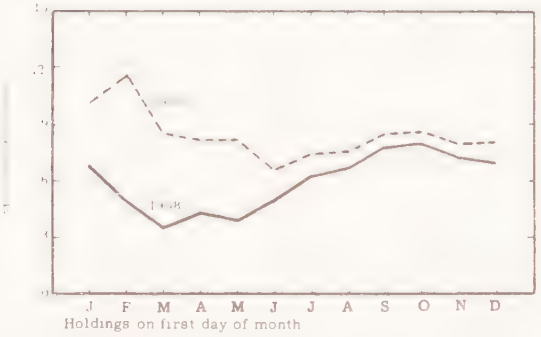
Cold-Storage Holdings

December 1

1958..... 6,651,000 Lbs.

1957..... 7,760,000 Lbs.

CHART II - COD FILLETS IN COLD STORAGE



Cold-storage holdings of cod fillets on December 1 were more than 14 percent below those of a year earlier (Chart 11).

Landings of cod through the first eleven months of 1958 were about 13 percent greater than for the same period in 1957. However, light landings are expected in the first quarter.

Imports, January - September

1958..... 37,329,000 Lbs.

1957..... 31,841,000 Lbs.

Imports of cod fillets through September of 1958 were about 17 percent higher than those during the corresponding period in 1957. Canada supplied about 75 percent of these imports.

HADDOCK FILLETS

Market - Firm Supplies - Light Demand - Brisk

Cold-Storage Holdings

December 1

1958.....5,780,000 Lbs.

1957.....7,241,000 Lbs.

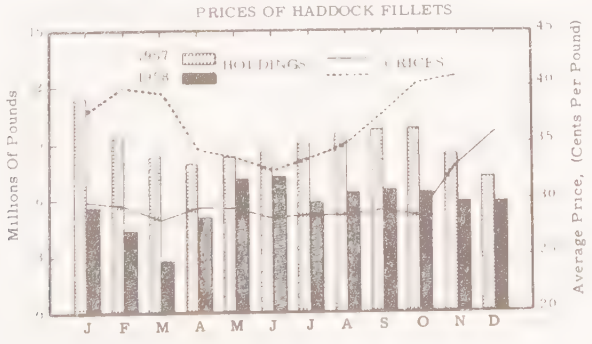
Cold-storage holdings of haddock fillets on December 1 were down 20 percent from those on December 1, 1957 (Chart 12).

Landings through November were down 9 percent from those in the first eleven months of 1957. First quarter landings are expected to continue light.

Imports of haddock fillets during the January - September 1958 period were about 16 percent below those during the same period in 1957. Canada supplied about 70 percent of these imports.

Prices should remain firm and high during the first quarter because of reduced landings and holdings (Chart 12).

CHART 12 - COLD STORAGE HOLDINGS AND WHOLESALE PRICES OF HADDOCK FILLETS



Holdings - First day of Month.
Prices - 1-lb. small, skins on, at Boston

OCEAN PERCH FILLETS

Market - Steady Supplies - Moderate Demand - Good

Cold-Storage Holdings

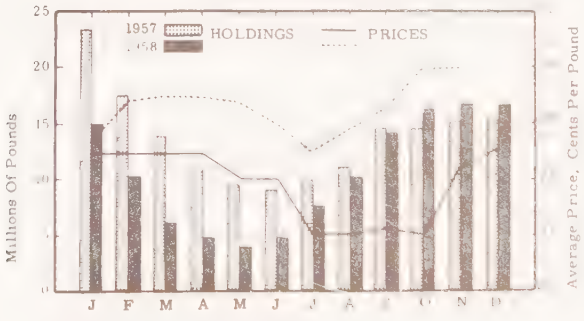
December 1

1958..... 16,767,000 Lbs.

1957..... 15,175,000 Lbs.

Cold-storage holdings of ocean perch fillets on December 1 were almost 11 percent higher than those a year earlier (Chart 13). The usual decline of stocks is expected during the first quarter.

CHART 13 - COLD STORAGE HOLDINGS AND WHOLESALE PRICES OF OCEAN PERCH FILLETS



Holdings - First Day Of Month
Price - 1-lb. carton, large, skins on, at Boston

Prices reached their highest level of the year in October, but should remain steady during the first quarter of 1959 (Chart 13).

OCEAN PERCH FILLETS (Cont.)

Imports

January - September

1958.....16,257,000 Lbs.

1957.....11,010,000 Lbs.

Imports of ocean perch fillets through September, 1958 were almost 48 percent higher than those during the first nine months of 1957. A decrease in these imports is expected during the first quarter.

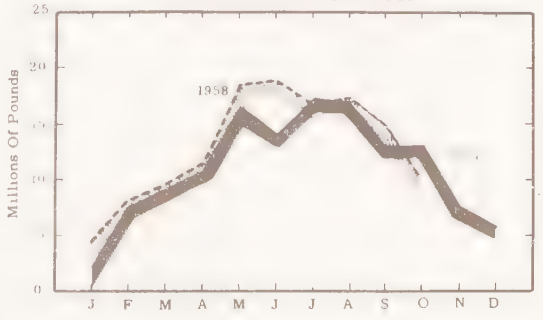
Landings of ocean perch in Maine and Massachusetts during the first ten months of 1958 were about 13 percent greater than those through October of 1957. Ocean perch landings during the first quarter will be light at the beginning and gradually increase (Chart 14).

Landings, January - October

1958.....133,908,000 Lbs.

1957.....118,784,000 Lbs.

CHART 14 - LANDINGS OF OCEAN PERCH, MAINE AND MASSACHUSETTS



HALIBUT

Market - Firm Supplies - Moderate Demand - Good

Landings of halibut on the Pacific Coast of the United States and Canada during the 1958 season totaled 64.5 million pounds. This was an increase of almost 5 percent or 3 million pounds over landings in 1957.

Cold-Storage Holdings

December 1

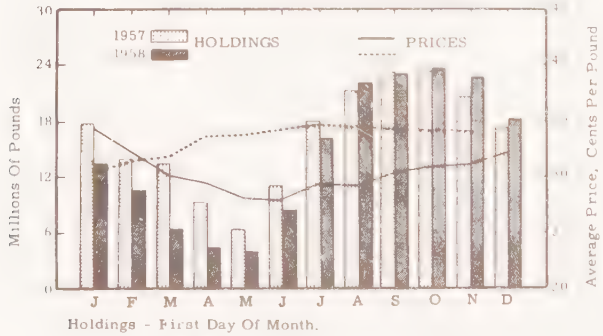
1958.....18,292,000 Lbs.

1957.....17,351,000 Lbs.

Cold-storage holdings of halibut on December 1 were 5.4 percent higher than those on the same date in 1957 (Chart 15).

Prices, which reached a high for the year during July, began to drop slightly (Chart 15) and are expected to level off during the first quarter.

CHART 15 - COLD STORAGE HOLDINGS AND WHOLESALE PRICES OF HALIBUT



Holdings - First Day Of Month.
Price - Western dressed, 20-80 lbs., frozen at New York

MACKEREL, FRESH AND FROZEN

Market - Steady Supplies - Moderate Demand - Good

Cold-storage holdings of mackerel on December 1, 1958 were 1,225,000 pounds or about 15 percent below those on the same date last year.

Landings of mackerel along the North Atlantic Coast will be light during the first quarter. However, expanding markets for Spanish mackerel will increase production efforts for this species along the South Atlantic Coast. Sizeable increases in landings are expected during the next few months.

Prices should be steady.

MACKEREL, CANNED

Market - Firm Supplies - Light Demand - Good

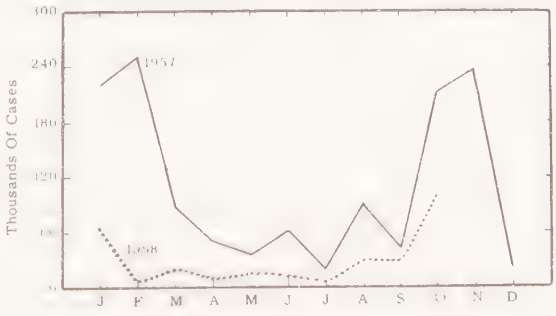
Pack of Pacific and Jack Mackerel

January - October

1958..... 300,693 Std. Cases

1957..... 1,060,380 Std. Cases

CHART 16 - CALIFORNIA PACK OF CANNED JACK AND PACIFIC MACKEREL



The pack of canned mackerel continues poor. Mackerel catch through December, 1958 was approximately 20,500 tons, a decrease of 70 percent compared with that of 1957 (Chart 16). There will be a greater concentration on mackerel by the fishing vessels now that the sardine season is closed. However, prospects are not encouraging.

SABLEFISH

Market - Steady Supplies - Moderate Demand - Moderate

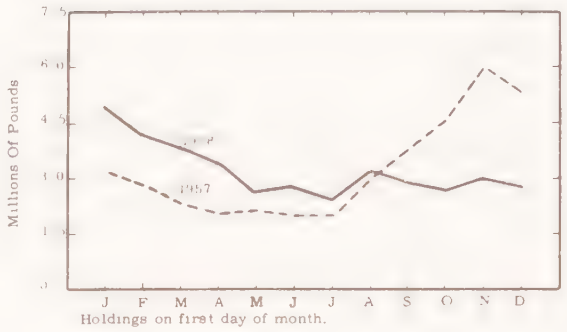
Cold-Storage Holdings

December 1

1958.....2,837,000 Lbs.

1957.....5,210,000 Lbs.

CHART 17 - SABLEFISH (BLACK COD) IN COLD STORAGE



Cold-storage holdings of sablefish on December 1 were 46 percent lower than those on the same date last year (Chart 17).

SALMON, FRESH AND FROZEN

Market - Unsettled Supplies - Moderate Demand - Slow

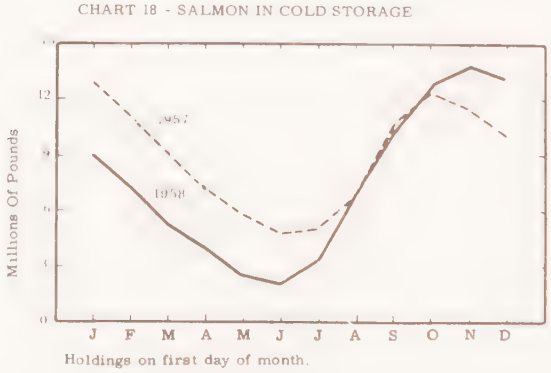
Cold-Storage Holdings

December 1

1958.....13,287,000 Lbs.

1957.....10,012,000 Lbs.

CHART 18 - SALMON IN COLD STORAGE



Cold-storage holdings of frozen salmon on December 1, 1958 were almost 33 percent higher than those on the same date last year (Chart 18).

SALMON, FRESH AND FROZEN (Cont.)

Imports, January - September

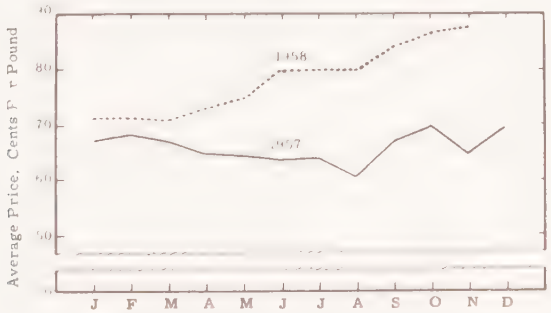
1958..... 15,329,000 Lbs.

1957..... 9,966,000 Lbs.

Imports of fresh and frozen salmon through the first nine months of 1958 were about 54 percent higher than those during a similar period in 1957. Canada supplied most of these imports. The total imported for the year 1957 was 15.6 million pounds.

Prices - Consumer resistance to high prices could cause a price weakening during the first quarter (Chart 19).

CHART 19 - WHOLESALE PRICE OF KING SALMON



Large dressed, frozen, at New York City

SALMON, MILD-CURED

Market - Steady Supplies - Light Demand - Moderate

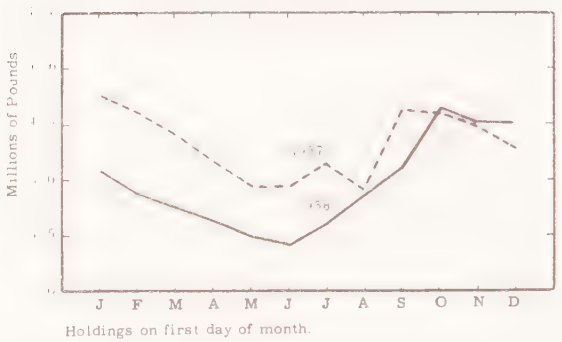
Cold-Storage Holdings

December 1

1958.....4,454,000 Lbs.

1957.....3,830,000 Lbs.

CHART 20 - MILD-CURED SALMON IN COLD STORAGE



Cold-storage holdings of mild-cured salmon on December 1 were 16 percent higher than those a year earlier (Chart 20).

Total 1958 Pacific Coast production of mild-cured salmon is estimated at 8,692 tierces. Because of the scarcity of the larger sizes of king salmon, a greater percentage of small king salmon was processed.

Prices are expected to remain high. The price per tierce for the larger sizes of cured king salmon reached the highest ever for this product. Some consumer resistance to these high prices is expected in the first quarter.

SALMON, CANNED

Market - Firm Supplies - Light Demand - Good

Season Pack (Preliminary)

(Standard Cases)

	Alaska	Pacific Coast States	Total
1958	2,989,290	650,290	3,639,580
1957	2,449,900	742,000	3,191,900

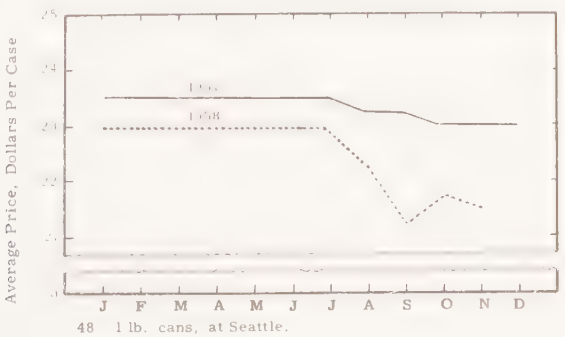
Pack - According to preliminary figures the total 1958 canned salmon pack was about 14 percent larger than that of 1957. A decline of about 12 percent in the pack of the Pacific Coast States was offset by a 22 percent increase in the output from the State of Alaska. Pinks represent about 53 percent of the Alaskan pack.

Imports - The canned salmon imports during the first nine months of 1958 have already about equalled those for the full year of 1957. Through September 1958, approximately 24 million pounds of canned salmon were imported from Japan and Canada. Total 1957 canned salmon imports amounted to 24.4 million pounds.

Exports of canned salmon through September were about 63 percent lower than those during the same period in 1957. In the first nine months of 1958, about 2 million pounds of canned salmon were exported compared with 5.4 million pounds through September of 1957.

Wholesale prices of canned pink salmon, after having dropped to the lowest level in several years, rose slightly in October (Chart 21) and are expected to level off during the first quarter.

CHART 21 - WHOLESALE PRICE OF CANNED PINK SALMON



48 1 lb. cans, at Seattle.

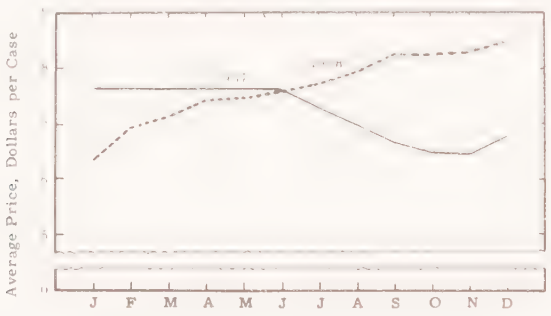
SARDINES, CANNED (MAINE)

Market - Steady Supplies - Moderate Demand - Moderate

The Maine sardine canning season closed on December 1, and the 1958 pack was approximately 2 million cases - about 120,000 cases below the 1957 pack. However, this was well below the average for the last ten years. Canners' stocks seem to be moving well, and the new quality-control standards should increase consumer acceptance.

Wholesale prices have continued to rise throughout the entire year, but should level off during the first quarter (Chart 22).

CHART 22 - WHOLESALE PRICE OF MAINE SARDINES



100-3¼ ounce cans, keyless, oil pack, at New York

SARDINES, CANNED (CALIFORNIA)

Market - Dull Supplies - Heavy Demand - Light

Total landings of California sardines for the 1958 season were 101,000 tons. This was larger than any year since 1951. The 1958 pack was 2.3 million cases, about 1.8 million higher than the 1957 pack of 498,000 cases.

Prices have been steady at $8.00 to $8.50 per case for pound ovals in sauce. Some reduction is expected in order to obtain sales in the export trade in competition with Japan and South Africa.

Exports of sardines, canned not in oil, through September, 1958 were 6.3 million pounds. This was about 39 percent lower than exports during the same period in 1957.

SARDINES, CANNED

Imports of Sardines Not-in-Oil

January - September

1958..... 9,502,000 Lbs.

1957..... 3,325,000 Lbs.

Imports of sardines canned not-in-oil continues to increase. Through September, the 1958 imports exceeded those on the same date in 1957 by 6.2 million pounds. Almost 78 percent of these imports were supplied by the Union of South Africa.

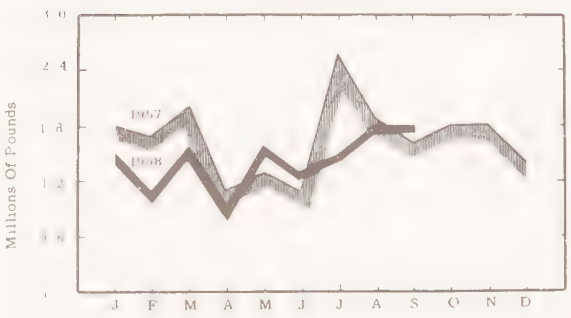
Imports of Sardines-in-Oil

January - September

1958..... 12,948,000 Lbs.

1957..... 15,147,000 Lbs.

CHART 23 - IMPORTS OF SARDINES CANNED IN-OIL



During the first nine months of 1958, imports of sardines canned-in-oil were about 15 percent lower than those through September, 1957 (Chart 23). Receipts of this product from Norway, the principal supplier, were down 2.3 million pounds during this period.

SWORDFISH

Market - Steady Supplies - Moderate Demand - Good

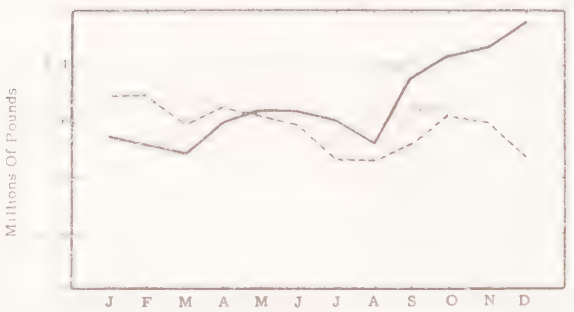
Cold-Storage Holdings

December 1

1958.....2,942,000 Lbs.

1957.....1,439,000 Lbs.

CHART 24 - SWORDFISH IN COLD STORAGE



Holdings on first day of month.

Cold-storage holdings of swordfish on December 1 were more than 100 percent higher than those on the similar date in 1957 (Chart 24).

Imports of swordfish through September totaled 15.3 million pounds compared with imports of 14.9 million pounds during the same period in 1957. Swordfish fillets comprised 9.8 million pounds of the total imported in 1958.

Prices should remain firm during the first quarter.

TUNA

Market - Steady Supplies - Heavy Demand - Good

Cannery Receipts of Fresh and Frozen Tuna

California

January - December

(In Tons)

	Imports	Domestic	Total
1958	72,000	156,000	228,300
1957	53,651	145,483	199,134

Record receipts of imported tuna largely accounted for the 1958 record high tuna cannery receipts in California. Imports accounted for approximately 32 percent of this total.

Imports, Frozen Tuna

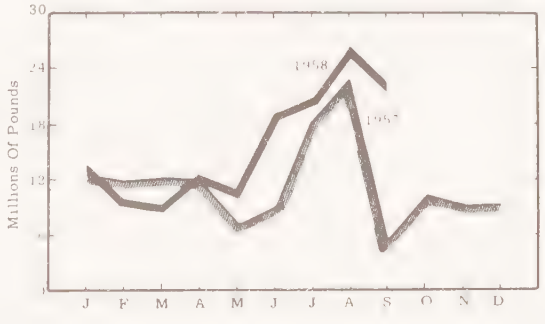
(All U. S. Ports)

January - September

1958..... 143,823,000 Lbs.

1957..... 110,989,000 Lbs.

CHART 25 - IMPORTS OF FRESH AND FROZEN TUNA



Imports of frozen tuna at all United States' ports during the first nine months of 1958 were approximately 30 percent higher than those during the same period in 1957 (Chart 25). Receipts of frozen yellowfin and skipjack more than doubled, whereas imports of albacore were about 23 percent lower than last year.

TUNA, CANNED

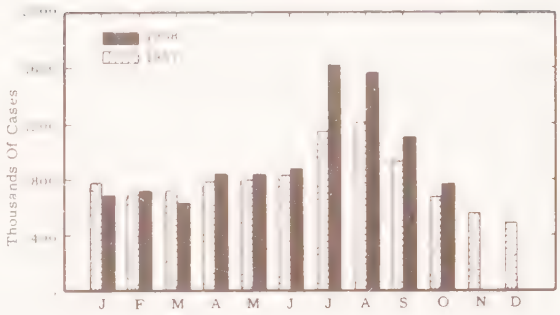
California Pack of Canned Tuna

January - December

1958..... 11,100,000 Std. Cases

1957..... 9,481,000 Std. Cases

CHART 26 - CALIFORNIA CANNED TUNA PACK



Pack - The California pack of canned tuna in 1958 exceeded the 1957 pack by 1.6 million cases or 17 percent (Chart 26).

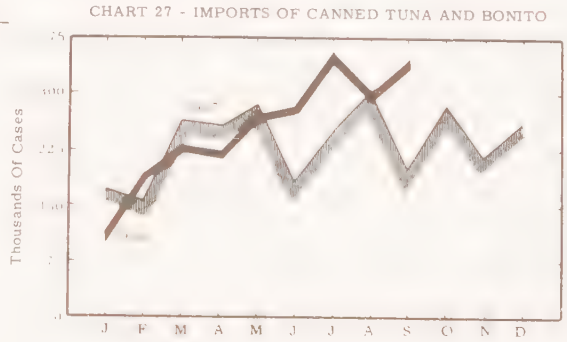
Imports of Canned Tuna and Bonito

January - September

1958..... 2,379,000 Std. Cases

1957..... 2,079,000 Std. Cases

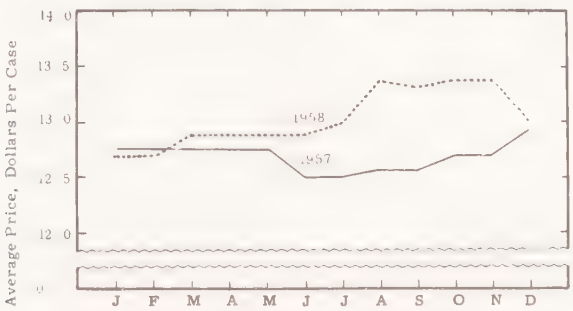
CHART 27 - IMPORTS OF CANNED TUNA AND BONITO



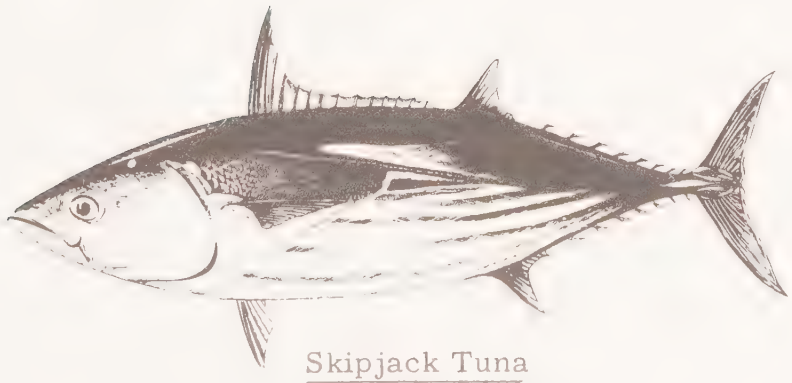
Imports - During the first nine months of 1958, imports of canned tuna and bonito were almost 15 percent higher than those through a similar period in 1957 (Chart 27). The canned albacore imports which had been below those of 1957 have now increased to approximately 2 percent above those of last year.

Wholesale prices were reduced in December (Chart 28). This might stimulate sales during the first quarter and help reduce the inventory of light meat tuna which was at a record high on January 1, 1959.

CHART 28 - WHOLESALE PRICE OF CANNED LIGHT MEAT TUNA



Solid pack, 48 7 ounce cans, at Los Angeles.
Average of weekly quotations for Advertised Brands and Other Packers' Labels.

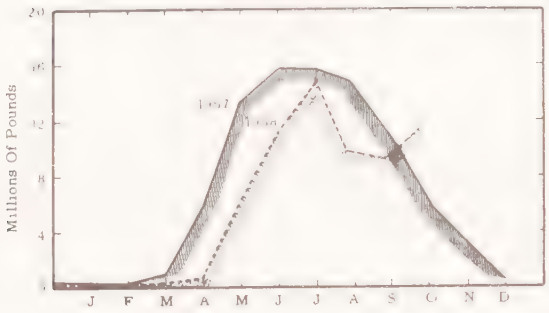


Skipjack Tuna
Average size, 4-20 lbs.

WHITING

Market - Steady Supplies - Moderate Demand - Good

CHART 29 - LANDINGS OF WHITING
MASSACHUSETTS



Landings of whiting in Massachusetts through November were about 35 percent below those during the same period in 1957 (Chart 29). First quarter landings will be seasonally light.

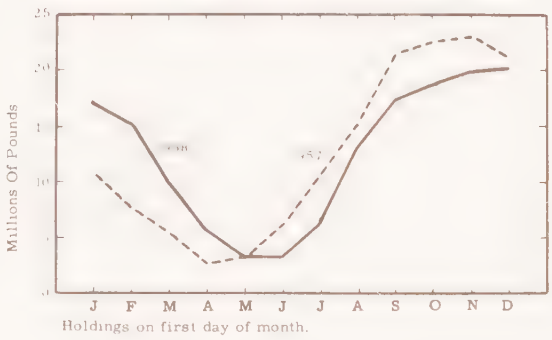
Cold-Storage Holdings

December 1

1958.....20,214,000 Lbs.

1957.....21,206,000 Lbs.

CHART 30 - WHITING IN COLD STORAGE



Holdings on first day of month.

Cold-storage holdings of whiting on December 1 were about 5 percent lower than those on the same date in 1957 (Chart 30).

Prices should remain steady during the first quarter.

CLAMS, FRESH

Market - Steady Supplies - Light Demand - Good

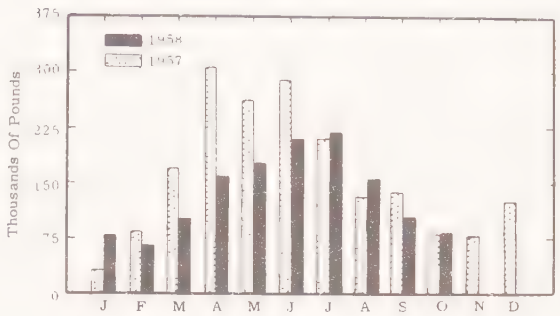
Production, January - October

(Maine Soft Clams)

1958..... 1,351,000 Lbs.

1957..... 1,760,000 Lbs.

CHART 31 - PRODUCTION OF MAINE SOFT CLAMS



Production of Maine soft clams again has declined. Through October, production had decreased 23 percent compared with figures for the same period in 1957 (Chart 31). No increase expected in the first quarter.

Prices should remain firm and high.

SURF CLAMS

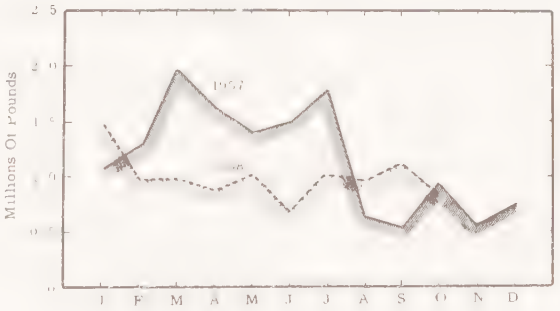
New Jersey Production

January - October

1958..... 10,005,000 Lbs.

1957..... 13,726,000 Lbs.

CHART 32 - LANDINGS OF SURF CLAMS, NEW JERSEY



Production of surf clams in New Jersey for the first ten months of 1958 was about 27 percent lower than that through October of 1957 (Chart 32).

Prices are expected to remain high.

CRABS AND CRAB MEAT, FRESH AND FROZEN

Market - Steady Supplies - Moderate Demand - Good

Production of hard crabs along the Atlantic and Gulf Coasts should be good during the first quarter. On the Pacific Coast, Dungeness crabs are expected to be in good supply also.

Cold-Storage Holdings

December 1

1958.....1,694,000 Lbs.

1957.....2,110,000 Lbs.

Cold-storage holdings of crabs and crab meat on December 1 were 19 percent lower than those a year earlier. Most of these holdings consisted of Dungeness crabs on the Pacific Coast.

Prices are expected to remain steady.

CRABS AND CRAB MEAT, CANNED

Season Pack

1958..... 7,246 Std. Cases

1957.....13,419 Std. Cases

Pack of canned crab meat, in the Gulf States, for the 1958 season was 46 percent lower than the 1957 pack. No pack figures are available for the Pacific Coast.

CRABS AND CRAB MEAT, CANNED (Cont.)

Imports

January - September

1958.....4,544,000 Lbs.

1957.....4,977,000 Lbs.

Imports of canned crab meat through September of 1958 were almost 9 percent lower than those in the same period of 1957. Most of these imports are king crab and come from Japan.

Prices are expected to remain high.

LOBSTERS, NORTHERN

Market - Steady Supplies - Moderate Demand - Good

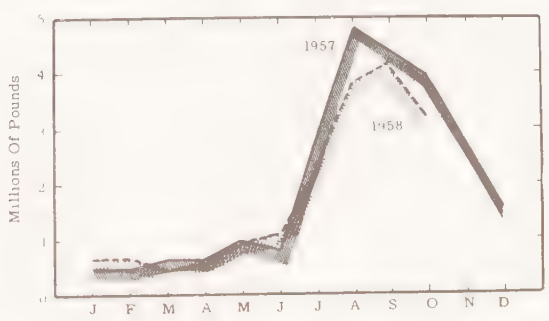
Maine Landings

January - October

1958.....17,800,000 Lbs.

1957.....20,300,000 Lbs.

CHART 33 - LANDINGS OF LOBSTERS, MAINE



Lobster landings in Maine through October were 12 percent below those in the same period of 1957 (Chart 33). During the first quarter, landings will be negligible with high prices.

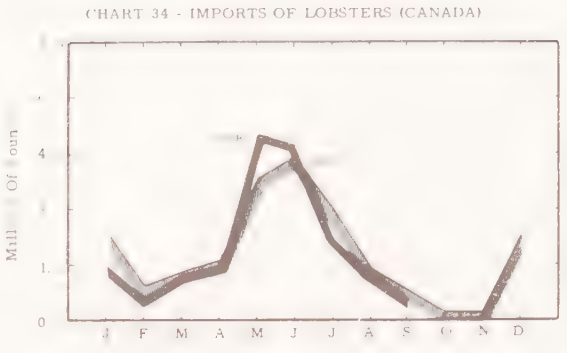
LOBSTERS, NORTHERN (Cont.)

Imports from Canada

January - September

1958.....18,332,000 Lbs.

1957.....19,474,000 Lbs.



Imports of lobsters from Canada through September were 6 percent lower than those during the first nine months of last year (Chart 34). However, receipts should increase during the first quarter.

Prices are expected to remain firm.

LOBSTERS, SPINY

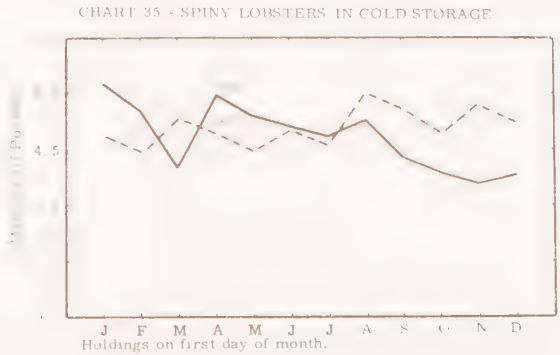
Market - Steady Supplies - Moderate Demand - Good

Cold-Storage Holdings

December 1

1958.....3,756,000 Lbs.

1957.....5,226,000 Lbs.



Cold-storage holdings of spiny lobsters on December 1 were 28 percent smaller than those a year earlier (Chart 35).

LOBSTERS, SPINY (Cont.)

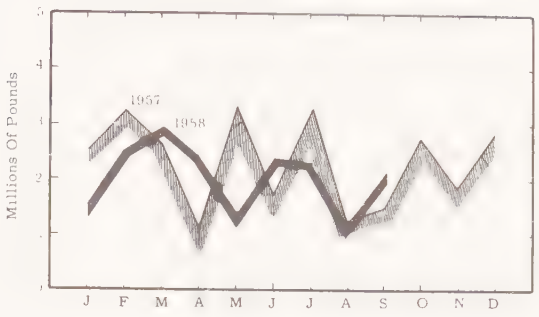
Imports

January - September

1958..... 18,728,000 Lbs.

1957..... 20,590,000 Lbs.

CHART 36 - IMPORTS OF SPINY LOBSTERS



Imports of spiny lobsters through September were 9 percent less than those during the first nine months of 1957 (Chart 36). Domestic production is negligible. Receipts are mostly from the Union of South Africa and Australia.

OYSTERS, FRESH-SHUCKED

Market - Active Supplies - Moderate Demand - Active

Production along the Atlantic Coast should hold up well during the first quarter.

Prices for shucked oysters are expected to continue high.

OYSTERS, CANNED

Market - Steady Supplies - Moderate Demand - Moderate

Oyster canning season is about to begin in the Gulf area. Present stocks are ample until new pack is marketed.

Prices should continue steady.

SCALLOPS, SEA

Market - Steady Supplies - Moderate Demand - Good

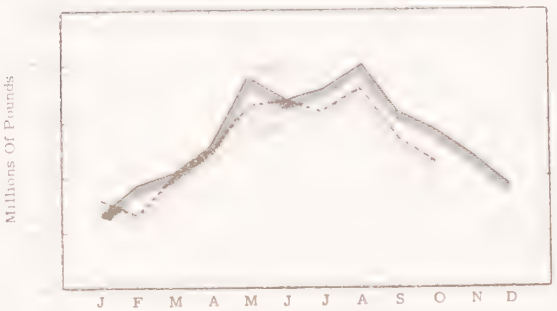
New Bedford Landings

January - November

1958..... 14,182,000 Lbs.

1957..... 15,530,000 Lbs.

CHART 37 - LANDINGS OF SCALLOPS, NEW BEDFORD



Shucked weight (lbs. of meat).

Landings of sea scallops during the first eleven months of 1958 were almost 9 percent lower than the quantity taken during the same period last year (Chart 37). Production of sea scallops during the first quarter is seasonally at the lowest level.

Cold-Storage Holdings

December 1

1958..... 2,221,000 Lbs.

1957..... 4,078,000 Lbs.

CHART 38 - COLD STORAGE HOLDINGS AND WHOLESALE PRICES OF SCALLOPS

Holdings - First Day Of Month
Price - Domestic 5-lb. carton, at Boston

Cold-storage holdings on December 1 were about 46 percent lower than those a year earlier (Chart 38).

Prices are expected to remain firm during the first quarter.

SHRIMP, FRESH AND FROZEN

Market - Strong Supplies - Moderate Demand - Good

Landings

January - August

Headless

1958.....63,368,000 Lbs.

1957.....72,291,000 Lbs.

Landings of shrimp in the Gulf and South Atlantic during the first eight months of 1958 were below those during the same period in 1957. However, estimated total production for 1958 is expected to equal the 1957 total of 116.3 million pounds.

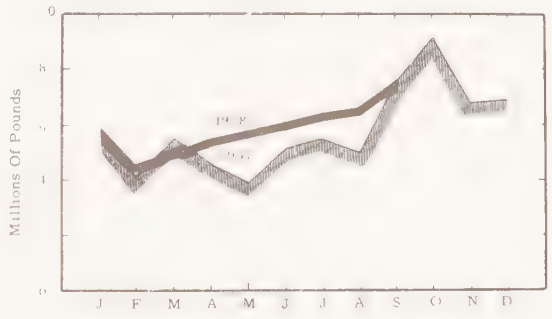
Imports

January - September

1958.....52,866,000 Lbs.

1957.....46,786,000 Lbs.

CHART 39 - IMPORTS OF SHRIMP



Imports of shrimp through September were 13 percent higher than those in the same period last year (Chart 39). Mexico supplied 61 percent of these receipts during the first nine months. Imports should continue heavy during the first quarter.

Cold-Storage Holdings

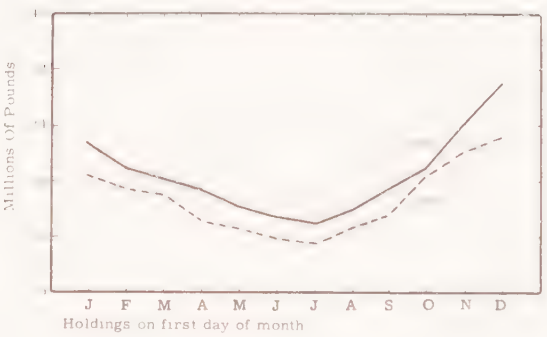
December 1

(Raw Headless)

1958..... 30,351,000 Lbs.

1957..... 22,326,000 Lbs.

CHART 40 - RAW HEADLESS SHRIMP IN COLD STORAGE



Cold-Storage Holdings

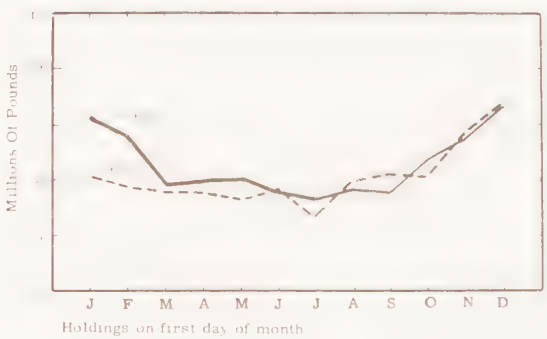
December 1

(All Others)

1958..... 9,872,000 Lbs.

1957..... 9,957,000 Lbs.

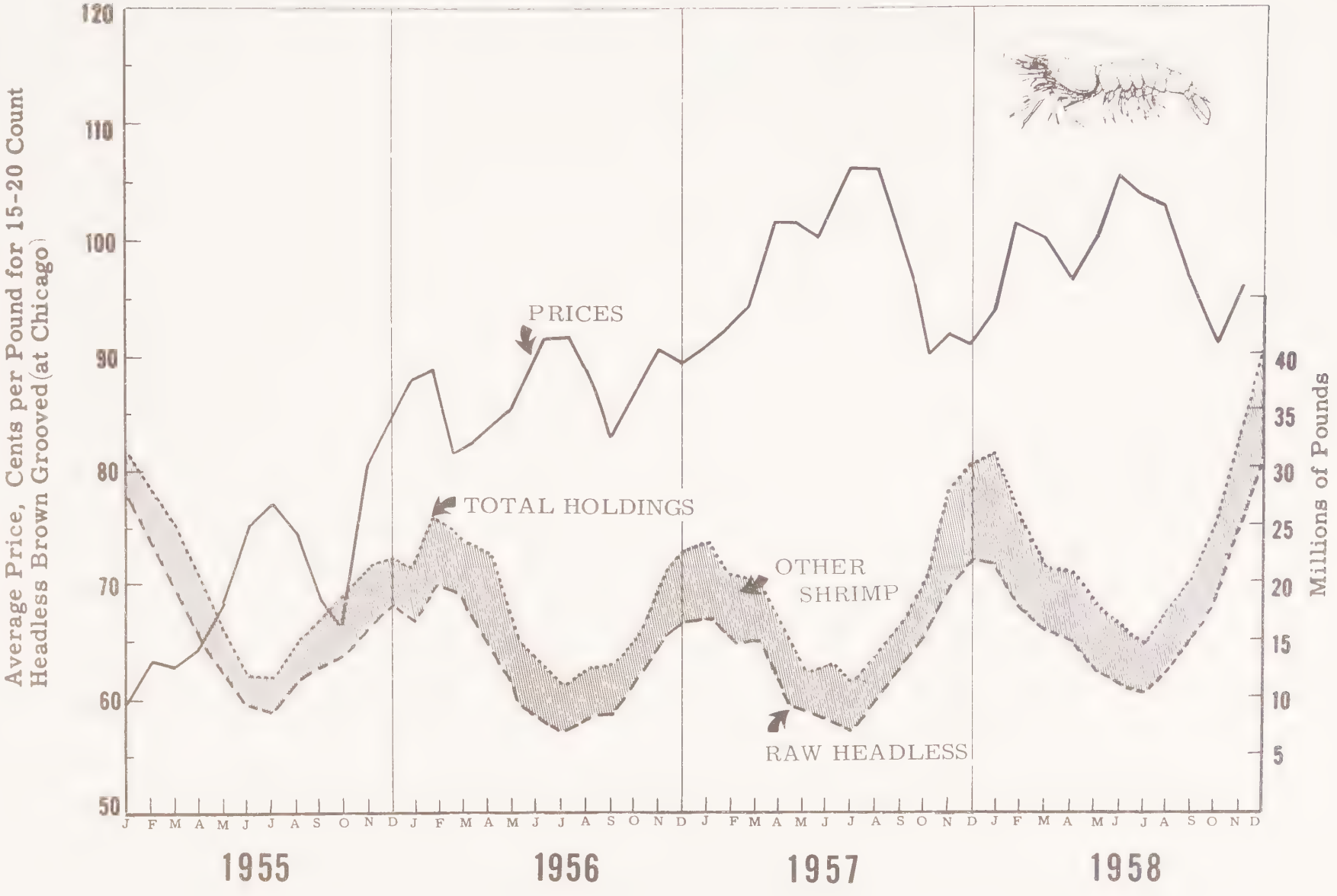
CHART 41 - ALL OTHER (PROCESSED) SHRIMP IN COLD STORAGE



Cold-storage holdings of raw headless shrimp on December 1 were 40 percent higher than those on the same date in 1957. Holdings of all other shrimp, including breaded, were less than one percent smaller than last year (Charts 40 and 41).

Prices at Chicago for headless, 15-20 count brown shrimp during November, 1958 averaged 95.8¢ per pound. This was slightly higher than prices at the same time last year (Chart 42).

CHART 42 - SHRIMP IN COLD STORAGE AND WHOLESALE PRICES



SHRIMP, CANNED

Market - Steady Supplies - Moderate Demand - Good

Pack

(Gulf States)

January - December

1958.....844,752 Std. Cases

1957.....554,453 Std. Cases

Pack of canned shrimp in the Gulf States during 1958 was more than 52 percent larger than that during 1957 (Chart 43). There will be very little canning during the first quarter. Stocks on hand should be ample to fill consumer demand.

Pacific Northwest pink shrimp will be in short supply. Inventories are practically non-existent.

Prices of canned Gulf shrimp should remain steady at slightly below the level of the first quarter of 1958.

Cold-Storage Holdings

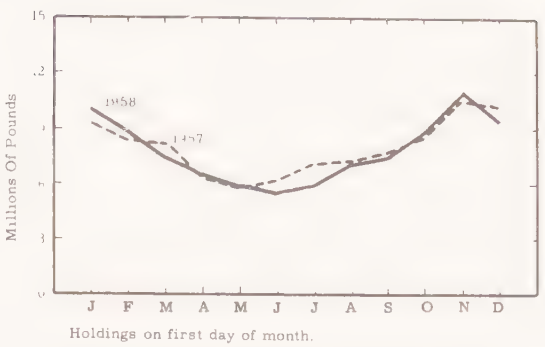
December 1

(United States)

1958..... 9,381,000 Lbs.

1957.....10,191,000 Lbs.

CHART 44 - FRESH-WATER FISH IN COLD STORAGE



Holdings on first day of month.

Cold-Storage Holdings

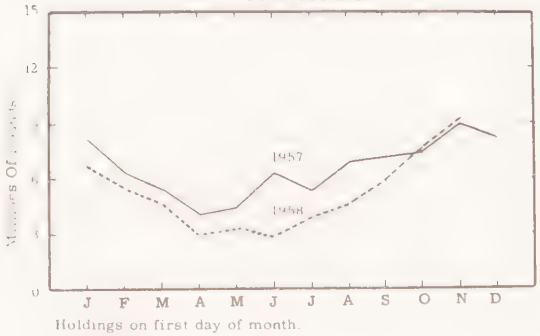
November 1

Canada

1958..... 9,188,000 Lbs.

1957..... 8,789,000 Lbs.

CHART 45 - CANADIAN FRESH-WATER FISH IN COLD STORAGE



Holdings on first day of month.

Cold-storage holdings of fresh-water fish in the United States on December 1 were about 8 percent lower than those a year earlier (Chart 44). Canadian holdings, however, were about 5 percent higher than those on November 1, 1957 (Chart 45).

Fish Imports

(Canada)

January - September

1958..... 28,300,000 Lbs.

1957..... 24,755,000 Lbs.

CHART 46 - IMPORTS OF FRESH-WATER FISH (CANADA)
(Does not include fillets)

Fillet Imports

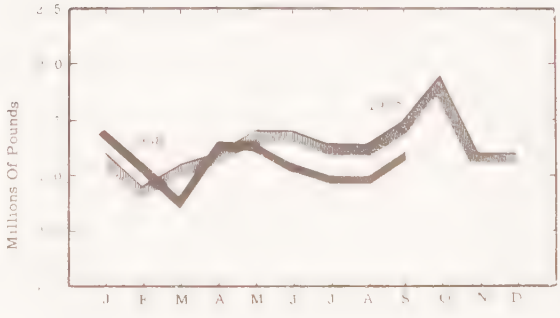
(Canada)

January - September

1958..... 10,054,000 Lbs.

1957..... 11,343,000 Lbs.

CHART 47 IMPORTS OF FRESH WATER FISH FILLETS (CANADA)



Imports of fresh-water fish (other than fillets) from Canada through September were approximately 14 percent higher than those through the first nine months of 1957 (Chart 46). Receipts of fresh-water fish fillets, however, were lower by about 11 percent (Chart 47). Since landings of fresh-water fish are very low during the first quarter, most of the demand will be met by imports.

Prices will continue steady.

FISH OIL

Market - Firm Supplies - Moderate Demand - Moderate

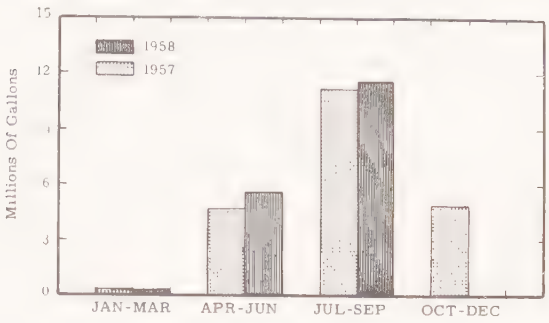
Production

January - November

1958.....19,786,164 Gals.

1957.....19,336,021 Gals.

CHART 48 - FISH OIL PRODUCTION



Production of fish oils through November was slightly more than 2 percent higher than that in the same period in 1957 (Chart 48). The first quarter is a period of seasonally light production.

Exports, January - September

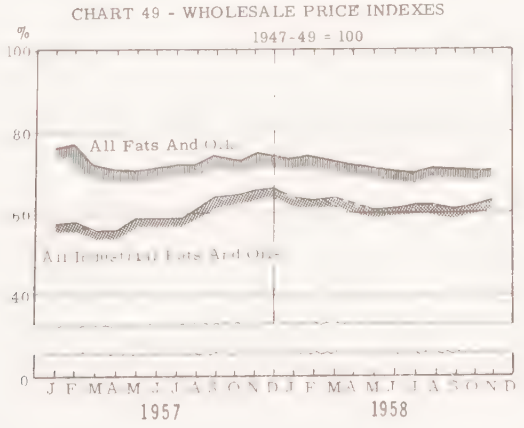
1958..... 48,963,000 Lbs.

1957.....104,176,000 Lbs.

Exports of fish oil during the first nine months of 1958 were 53 percent lower than those through September of 1957. There were continued sharp declines in shipments to the Netherlands and West Germany.

Wholesale price index for all fats and oils in November was 70.1, a decline of 3.4 points from November of 1957. The index for all industrial fats and oils was at 63.0, a decrease of 2.1 points from that of a year earlier (Chart 49).

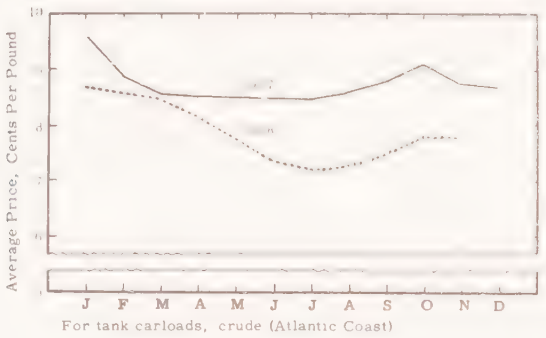
CHART 49 - WHOLESALE PRICE INDEXES



FISH OIL (Cont.)

Wholesale price of menhaden oil in November was 7.81 cents per pound as compared with 8.75 cents per pound in November of 1957 (Chart 50). Prices are not expected to change significantly.

CHART 50 - WHOLESALE PRICE OF MENHADEN OIL



For tank carloads, crude (Atlantic Coast)

FISH MEAL

Market - Firm Supplies - Light Demand - Moderate

Production

January - November

1958.....201,536 Tons

1957.....233,237 Tons

Production of fish meal through November was almost 14 percent lower than that during the first eleven months of 1957. During the first quarter, production will be very low. The menhaden catch, which is the principal source of fish meal, was lower by 205 million pounds through November of 1958 compared with the same period last year, but the oil yield was higher.

FISH MEAL (Cont.)

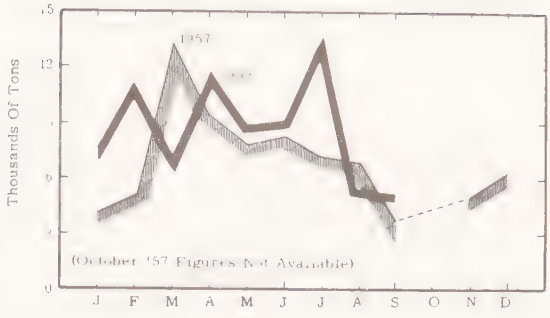
Imports

January - September

1958.....79,881 Tons

1957.....66,148 Tons

CHART 51 - IMPORTS OF FISH MEAL



Imports of fish meal during the first nine months of 1958 were about 21 percent higher than those during the corresponding period in 1957 (Chart 51). Total 1958 imports should be considerably higher than those in 1957 which amounted to 81,196 tons.

CHART 52 - WHOLESALE FEEDSTUFF PRICE INDEX
1947-49 = 100

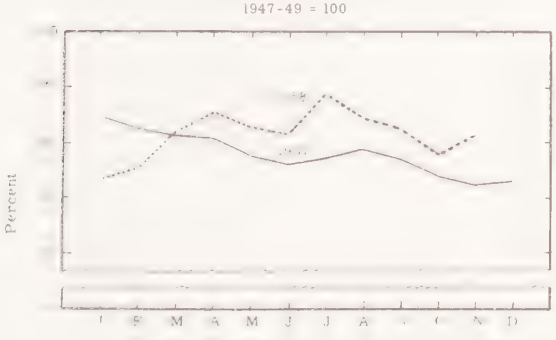
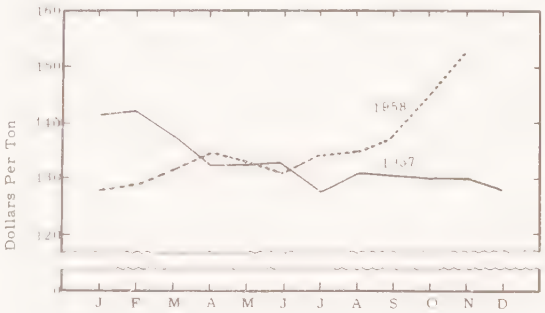


CHART 53 - WHOLESALE PRICE OF MENHADEN MEAL



For 60% protein, burlap bag, at Eastern ports.

Wholesale feedstuff price index for November was 81.7, up 9.6 points from a year earlier and 3.3 points higher than the preceding month (Chart 52).

Wholesale price for menhaden meal during November was at the very high level of $152.7 per ton (Chart 53). Prices continue firm and are expected to rise still higher during the next three months.

The statements appearing in this report are interpretations of past experiences influenced by current indications of what probably will occur. Wide use is made of interviews and correspondence with representative members of the commercial fishing industry, in order to obtain the opinions of the trade as to the business conditions generally expected to prevail during the period of the year covered by the report. Five-year averages are no longer shown because of realignments in statistical reporting.

Sources of Chart Data

Chart 2, U. S. Department of Labor
Charts 10, 23, 25, 27, 34, 36, 39, 46, 47, 51, U. S. Department of Commerce
Charts 49, 52, U. S. Department of Agriculture
Charts 16, 26, California Department of Fish and Game, Marine Fisheries Branch
Chart 45, Canadian Bureau of Statistics

Market Terms Used in This Report

The terms under the headings Market, Supplies, and Demand are intended to indicate the degree of market activity produced by the particular supply and demand situation.

Market refers to movement of supplies and the price structure.

Supplies refer to available stocks, i.e. receipts, imports, cold-storage holdings, and processed fish and shellfish. The terms used are relative and do not signify any particular quantity.

Demand measures the readiness of the trade to absorb supplies.

Market	Supplies	Demand
Excited	Very heavy	Exceeds supply
Stronger	Heavy	Brisk
Strong	Liberal	Active
Active	Moderate-to-Liberal	Good
Firm	Moderate	Improving
Steady	Light-to-Moderate	Moderate
Unsettled	Light	Light
Dull		Slow
Weak		Practically no demand
Demoralized		No demand

Prices refer to those at wholesale or comparable level.

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